

# COUNTRY BRAND INDEX 2006

Insights, Findings and Country Rankings



**AS A FORWARD THINKING, FUTURE-ORIENTED GLOBAL  
BRAND CONSULTANCY, FUTUREBRAND LAUNCHED  
ITS FIRST COUNTRY BRAND INDEX IN 2005 TO  
CONSIDERABLE GLOBAL INTEREST AND ACCLAIM.**

# SINCE COUNTRIES CONTINUE TO BE ONE OF THE MOST PROMISING AND COMPLICATED BRANDING CHALLENGES, WE LOOKED FORWARD TO EXPANDING OUR COUNTRY BRAND INDEX THIS YEAR.

While the concept of countries as brand is becoming more accepted, the category continues to be dominated by generic marketing; true adoption of brand as a critical country asset continues to be underdeveloped. This study focuses on the tourism component of country brands, since it is currently the most visible and marketed manifestation of a country. However, the Index also acknowledges other significant areas of country brand opportunities (for instance, investments and exports), and strongly encourages countries to view their brand holistically, rather than in discrete government silos.

FutureBrand spends countless hours interviewing consumers, business travelers and meeting planners all over the world to uncover destination insights. Additionally, we speak to government officials and agencies, travel professionals, analysts and associations to examine the true potential and common pitfalls of branding countries. The result, in combination with our country and destination experience, provides a unique perspective on the world of country branding and marketing nations.

This year's Index has rich and deep findings. In addition to our rankings, we continue to develop learnings, trends, suggestions and opportunities. FutureBrand feels it is critical to look at countries as more than commodities, to shift focus from reactive to strategic, and to urge countries to truly embrace their potential of becoming some of the strongest brands in the world. This takes work and discipline, but the investment is clearly merited. Successful country brands rise above competition to capture world awareness that translates into coveted tourism and investment revenue streams.

# COUNTRY BRAND INDEX 2006

## country [kuhn-tree]

[Origin: 1200–50; ME cuntree < AF, OF < VL \*(regiō) contrāta terrain opposite the viewer, equiv. to L contr(a) counter<sup>3</sup> + -āta, fem. of -ātus -ate<sup>1</sup>; cf. G Gegend region, deriv. of gegen against]

1. a state or nation
2. the territory of a nation
3. the people of a district, state, or nation
4. the land of one's birth or citizenship
5. rural districts, including farmland, parkland, and other sparsely populated areas, as opposed to cities or towns
6. any considerable territory demarcated by topographical conditions, by a distinctive population, etc.
7. a tract of land considered apart from any geographical or political limits; region; district

Countries are all of these definitions, in addition to much more. More than borders, physical locations and discrete populations, countries are businesses and dreams, corporations and myths, economic engines and memory makers.

Countries are brands, by design or default. A country brand can be a generic label or ubiquitous wrapper, or can become the compelling glue between political, social and economic pillars of a nation. Brand, when properly conceived and executed, can elevate a country, focus its tourist offering, fuel its outbound and inbound investment, reframe its reputation and create renewed pride among its citizens.






## CONTENTS

This year we've looked at country branding from four vantage points: The Experts, The Customer, The Channels and The Category to deconstruct the forces and dynamics involved in creating and sustaining country brands.

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# 2006 TOP COUNTRY BRAND RANKING

# TOP COUNTRY BRANDS

01	A	U	S	T	R	A	L	I	A	
02	U	S	A							
03	I	T	A	L	Y					
04	F	R	A	N	C	E				
05	G	R	E	E	C	E				

06	U	K									
07	S	P	A	I	N						
08	N	E	W	Z	E	A	L	A	N	D	
09	M	A	L	D	I	V	E	S			
10	I	N	D	I	A						

Methodology: FutureBrand has developed a three-tiered evaluation system for ranking country brands, creating an integrated snapshot of a brand's promise and potential. The Index incorporates traditional quantitative market research from a globally diverse sample, along with expert opinions and relevant statistics that link brand equity directly to assets, growth and expansion. The result is a unique evaluation system that provides the basis of our rankings. A more detailed explanation of the study's methodology can be found at the end of this document.

# LEADERS AT A GLANCE

## 1 Australia

Population: 20,264,082  
GDP: \$612.8 billion  
Size: 2,967,909 sq. miles  
Airports: 455

Tourism & travel government expenditure: 3.7%  
Tourism & travel growth: 3.6%  
Tourism & travel industry GDP: 5.3%

Experts say:

“Really doing an impressive job of promoting themselves. Australia understands the idea of using the whole country, not just pieces.”

## 2 USA

Population: 298,444,216  
GDP: \$12.5 trillion  
Size: 3,718,712 sq. miles  
Airports: 14,858

Tourism & travel government expenditure: 5.1%  
Tourism & travel growth: 3.7%  
Tourism & travel industry GDP: 3.9%

Experts say:

“Many U.S. destinations... have improved in terms of the range of quality lodging options, dining venues and affordable inbound airline lift.”

## 3 Italy

Population: 58,133,509  
GDP: \$1.7 trillion  
Size: 116,305 sq. miles  
Airports: 133

Tourism & travel government expenditure: 3.6%  
Tourism & travel growth: 2.9%  
Tourism & travel industry GDP: 4.6%

Experts say:

“Italy is the most authentic country thanks to its history, culture and its great conservation efforts despite the constant growth of its cities.”

## 4 France

Population: 60,876,136  
GDP: \$2.1 trillion  
Size: 211,209 sq. miles  
Airports: 477

Tourism & travel government expenditure: 3.1%  
Tourism & travel growth: 3.8%  
Tourism & travel industry GDP: 4.4%

Experts say:

“An incredibly strong reputation and one that delivers on expectations, evident from the consistently high number of inbound travelers.”

## 5 Greece

Population: 10,688,058  
GDP: \$209.7 billion  
Size: 50,942 sq. miles  
Airports: 82

Tourism & travel government expenditure: 3.8%  
Tourism & travel growth: 6.7%  
Tourism & travel industry GDP: 6.5%

Experts say:

“Greece: friendly people with great surroundings and great food.”



## 6 United Kingdom

Population: 60,609,153  
GDP: \$2.2 trillion  
Size: 94,526 sq. miles  
Airports: 471

Tourism & travel government  
expenditure: 2.8%  
Tourism & travel growth: 3.7%  
Tourism & travel  
industry GDP: 3.5%

Experts say:

**“An icon. Full of history,  
charm and modern  
interests. From cities to  
countryside, music to  
museums, the UK has it.”**

## 7 Spain

Population: 40,397,842  
GDP: \$1.0 trillion  
Size: 194,897 sq. miles  
Airports: 157

Tourism & travel government  
expenditure: 6.7%  
Tourism & travel growth: 4.6%  
Tourism & travel  
industry GDP: 6.9%

Experts say:

**“To me Spain is still a  
sleeper. It’s a great brand  
that should be even greater.  
Each city is a jewel and  
the food and nightlife  
are amazing.”**

## 8 New Zealand

Population: 4,076,140  
GDP: \$94.6 billion  
Size: 103,738 sq. miles  
Airports: 118

Tourism & travel government  
expenditure: 3.3%  
Tourism & travel growth: 4.5%  
Tourism & travel  
industry GDP: 7.4%

Experts say:

**“They didn’t turn into  
Australia or the UK and  
they have remained true to  
their assets. In that sense  
they understand branding  
better than most.”**

## 9 Maldives

Population: 359,008  
GDP: N/A  
Size: 116 sq. miles  
Airports: 5

Tourism & travel government  
expenditure: 14.8%  
Tourism & travel growth: 20.8%  
Tourism & travel  
industry GDP: 34.2%

Experts say:

**“Unlike anywhere else. Truly  
blessed by nature. Their  
marketing could be better,  
but the place could not.”**

## 10 India

Population: 1,095,351,995  
GDP: \$719.8 billion  
Size: 1,269,346 sq. miles  
Airports: 341

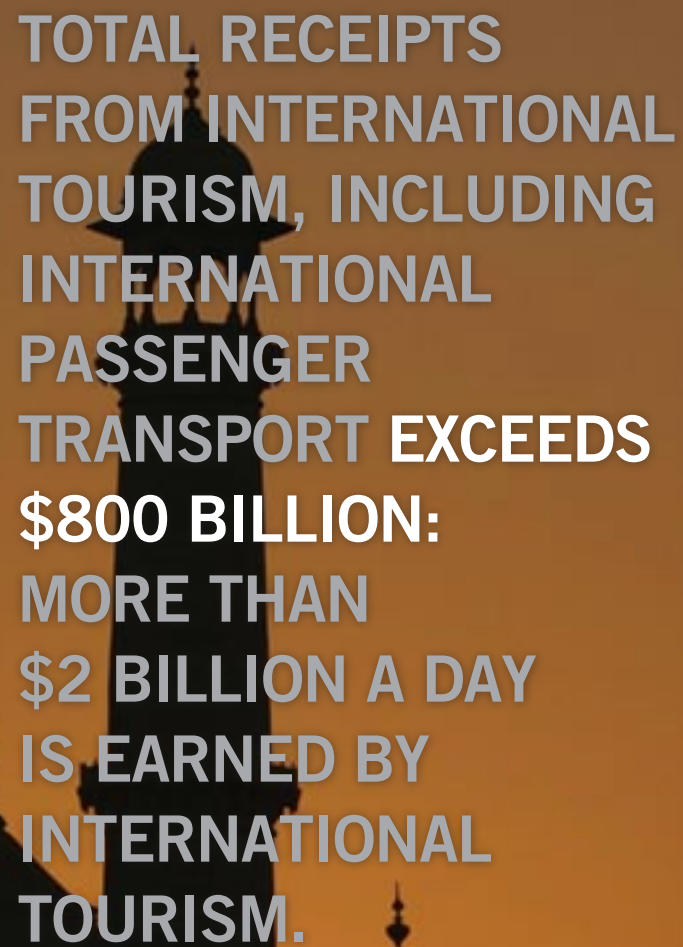
Tourism & travel government  
expenditure: 1.0%  
Tourism & travel growth: 8.4%  
Tourism & travel  
industry GDP: 2.1%

Experts say:

**“I still think there is room  
for improving the brand  
image of India, but it  
has come a long way. It’s  
definitely going to be a  
super-brand across tourism,  
industry and business.”**



**IN 2005, WORLDWIDE RECEIPTS FROM INTERNATIONAL TOURISM REACHED \$682 BILLION, AN INCREASE OF \$49 BILLION FROM THE PREVIOUS YEAR. THIS RISE IS COMPARABLE TO THE COMBINED RECEIPTS OF THE CARIBBEAN, CENTRAL AMERICA, SOUTH AMERICA AND SOUTH ASIA.**




**TOTAL RECEIPTS FROM INTERNATIONAL TOURISM, INCLUDING INTERNATIONAL PASSENGER TRANSPORT EXCEEDS \$800 BILLION: MORE THAN \$2 BILLION A DAY IS EARNED BY INTERNATIONAL TOURISM.**



**THE WORLD'S TRAVEL AND TOURISM INDUSTRY IS EXPECTED TO CONTRIBUTE \$1.76 TRILLION (3.6%) TO GROSS DOMESTIC PRODUCT IN 2006.**




A low-angle photograph of the Eiffel Tower in Paris, France, showing its intricate iron lattice structure against a clear blue sky.

**IN THE FIRST FOUR MONTHS OF 2006, TOURISM INCREASED BY 4.5% FROM THE SAME PERIOD IN 2005, OR BY 10 MILLION PEOPLE.**

A photograph of the Colosseum in Rome, Italy, showing the massive stone arches and columns of the ancient amphitheater. A person is visible in the distance for scale.

**TRAVEL AND TOURISM ACTIVITY IS EXPECTED TO GROW BY 4.2% PER YEAR IN REAL TERMS BETWEEN 2007 AND 2016.**

A photograph of a traditional European building with a steep, dark roof and a white facade, situated in a rural setting with greenery.

**THE WORLD'S TRAVEL AND TOURISM ECONOMY DIRECTLY AND INDIRECTLY ACCOUNTS FOR 1 IN EVERY 11.5 JOBS (234,305,000) AND IS 8.7% OF TOTAL EMPLOYMENT.**







# 01. THE EXPERTS

A GLOBAL SAMPLE OF INTERNATIONAL TRAVEL, HOSPITALITY AND DEVELOPMENT INDUSTRY LEADERS COMPRISE OUR EXPERT OPINIONS. THEY SPAN WRITERS, EDITORS, ANALYSTS, MARKETERS, MANAGERS AND OTHER SECTOR PROFESSIONALS. EXPERTS ARE AN IMPORTANT COMPONENT OF THE COUNTRY BRAND INDEX BECAUSE THEY TEMPER THE CURRENT PERCEPTIONS OF LEISURE AND BUSINESS TRAVELERS WITH A PERSPECTIVE OF THE FUTURE: WHO OR WHAT IS EMERGING, WHAT IS OR ISN'T WORKING, AND WHAT ARE THE NEW APPROACHES, NEW SEGMENTS AND NEW CONCERNS.



# COUNTRY BRAND INDEX EXPERTS 2006

## **Alvaro Amoretti**

Tourism Journalist  
Uruguay

## **John Antonello**

Managing Director, Travel & Leisure Group  
Phoenix Marketing International

## **Chieko Aoki**

President  
Blue Tree Hotels

## **Don Birch**

CEO  
Abacus International Pte. Ltd.

## **James Boyd**

Director of PR North America  
Singapore Airlines

## **Giorgio Callegari**

Vice President Alliances and Business Development  
Alitalia Spa

## **Cristina Cotrim**

Tourism Agent  
Otto Turismo

## **Thomas L. Doorley III**

CEO, Chairman  
Sage Partners

## **Roger Dow**

President & CEO  
Travel Industry Association of America

## **Keith Jay Fernandez**

Editor  
Travel & Tourism News Middle East  
UAE Bureau Chief  
Al Hilal Publishing & Marketing Group

## **Andrea Frost**

Global Campaigns Manager  
Lonely Planet

## **Javier Fuica**

Coordinator  
Mercurio

## **Romolo Guasco**

Managing Director  
Litorale Spa

## **David Hillis**

Manager, Strategic Planning  
Best Western International

## **Alan Liu**

General Manager  
China Science International Travel Agency

## **Josimar Melo**

Managing Partner and Gastronomy Critic  
Basilico Gastronomy

## **Ge Mu**

Marketing Department Manager  
Beijing Caissa International Service Co., Ltd.

## **Gonzalo Zegarra Mulanovich**

Editor Gerente  
Apoyo Publicaciones



**Marco Nijhof**

Sr. Vice President, Gulf  
Jumeirah International

**Piero Pasqua**

Journalist  
Italy

**Hernán Passalacqua**

General Manager  
Fitzroy

**Enio Pinto**

Miranda Gastronomy Consultant  
Abresi Gastronomy

**Sujata Raman**

Managing Director  
Abercrombie & Kent, Australia & New Zealand

**Daniel Reed**

Business Travel & Airlines Editor, Texas Bureau  
USA Today

**Lucy Rickett**

Partner  
Sputnik Communications

**Ed Salvato**

Travel Editor  
PlanetOut Inc.

**Nevio Schiavone**

General Manager  
Federculture

**Gustavo Sencio**

Assessor  
Asociación Empresaria Argentina

**Asad Shiraz**

Director  
The Tourism Company Pte. Ltd.

**Jason Shugg**

Product Marketing Manager  
Lonely Planet

**Guido Venturini**

General Manager  
Italian Touring Club

**Yanhua Wang**

Deputy General Manager  
M.I.C.E Service, China Travel Service

**Arnie Weissmann**

Editor in Chief  
Travel Weekly

**Nan Zhang**

Owner  
Tongyuan International Travel Agency

**Wei Zhang**

Vice President  
Voice of Chinese International  
Network Technology Co., Ltd.

# VIEWS FROM THE EXPERTS

## The Total Package

Experts see the value in becoming a complete offering, appealing to varied travelers with varied interests and lifestyle preferences.

“ New Zealand has made huge strides in building a contemporary image and in constructing a diverse, world-class yet unique tourism experience that nearly every visitor loves. ”

“ The US and Italy offer the business traveler a full menu of options, not only for work, but also to extend the stay for leisure. ”

“ Australia is a modern country with an enormous potential... it offers a European lifestyle matched with Asian pragmatism and Anglo-Saxon culture. ”

## Lure of History

Experts report that history-rich countries in the East are the rising stars of tomorrow.

“ China: it's hard to match China, there's such a buzz about the country now that everyone from Bollywood films to the cross-country driver wants to go visit. ”

“ India has great tourism potential due to its vastness in terms of country, history and the cultural aspect. At the same time the country is beautiful. ”

“ Vietnam: There is the historical affinity for those whose family and friends fought in the war. It is affordable, close and seen to be less 'touristy'... ”

## Emotional Connection

Experts suggest that the brand building efforts centered on emotionally driven content strikes a chord with travelers.

“ A destination is not something conceptual, it is rather emotional. You have to play with images, sounds, smells, tastes. ”

“ ...New Zealand has managed to capture the essence of the country's best attributes in its advertising, cross-marketing with the entertainment community and key products, such as lamb and wine. ”

“ A country is the sum of its parts. Tell me about the parts and make me care about them. ”



## Polarizing country paradigms beginning to emerge

### Niche or Comprehensive

“ I see more and more countries going two ways: deep, promoting ownable niche offerings like Costa Rica and Peru or broad, the whole culture/art/history package like Italy or France. ”

### Country At Sea

“ I think cruises are going to start co-opting some country brands by providing multiple destination experiences in an all-in-one, simple package. ”

### Stay Put or Keep Going

“ There’s a split between those who travel to a place like London and use it as their base of operations for a week in England, versus those that never stop moving, exploring a new city every other day. ”

“ With recent clashes in Europe over the Middle East, many Middle Eastern travelers are now choosing Turkey, Morocco and Lebanon over France and England. ”

### The Country of Cities

“ Cities are becoming the new countries, and capitals or notable cities often drive the destination. ”





# AUTHENTICITY

## If you've got it, flaunt it

Last year FutureBrand highlighted the importance of authenticity as a key branding component. This year authenticity appears to be growing in importance, as indicated by our experts and its high ranking among travelers' needs and wants.

The global desire for authenticity favors countries which tend to have more preserved and unique cultures, and creates a strong opportunity for developing or emerging countries to leverage. Sense of place, culture and character must be evident as a country expands or creates its travel, tourism, trade and investment offerings.

"A country's ability to be authentic, deliver authentic and communicate authentic is probably one of its biggest destination advantages today."

"People want to experience the true essence of a different place. This is the magic of a country brand."

"Mexico, India and New Zealand all do solid jobs of communicating something authentic. Countries like Thailand, Oman and South Africa are starting to pursue this approach as well."

"My advice: if you can claim and provide authenticity, do it."







## 02. THE CUSTOMER

TRAVEL-ORIENTED CONSUMERS AND ACTIVE BUSINESS

TRAVELERS WERE SURVEYED AS PART OF THE COUNTRY

BRAND INDEX RESEARCH. UNDERSTANDING TRAVEL

MOTIVATIONS, CONSIDERATIONS, BEHAVIORS AND DECISION

MAKING PROCESSES ARE A CRITICAL COMPONENT OF

ENSURING A COMPELLING COUNTRY BRAND.

# THE WORLD OF THE CUSTOMER



# IMPORTANT SELECTION CONSIDERATIONS

Our research indicates the practical (needs) and experiential (wants) considerations that people prioritize when selecting a country to visit. Since the majority of countries already rank reasonably high in consumer awareness, these are the important constructs that countries must understand.

## NEEDS

Practical Considerations

1. Safety\*
2. Value for money
3. Ability to communicate easily
4. Proximity
5. Weather

## WANTS

Experiential Motivations

1. Natural Beauty
2. Authenticity
3. Art/Culture
4. Lodging/Resort options
5. Outdoor activities/Sports

\*It's significant to note that although practical considerations can be considered essential entry level requirements, safety has moved up significantly in the past year. This suggests potential visitors feel that travel can be increasingly unsafe.





# BEHAVIORAL DRIVERS OF DESTINATIONS

There is a clear link between the highly ranked practical considerations and the experiential motivations that business and leisure travelers find essential. The following drivers comprise ingredients of country brand success and should be used as an evaluation filter to assess what a destination can bring to the marketplace.

## ESCAPISM

The notion of leaving home and daily routine is almost a universal travel motivator. While the degree of desired “difference” varies among travelers, finding new places to relax or be active is critical.

## DISCOVERY

Not only being somewhere different, but also doing something different is a significant travel driver and trend. Being able to provide something genuine, engaging and exotic is becoming a baseline requirement.

## AFFINITY

Feeling safe, comfortable and able to communicate amidst new and exciting experiences is still a necessity for most travelers today. The ability to connect to the country and its people, and create long lasting memories contributes to success.

## DELIGHT

The most primal driver, delight celebrates the sensorial experience of a destination – its sounds, smells and sights. A national cuisine, a favored spice, a well-known monument... all help capture visitor intrigue.

# EMERGING TRAVEL TRENDS

A key area of FutureBrand's expertise is anticipating the future by evaluating predictive actions and behaviors.

A number of trends reported in the 2005 Country Brand Index endure, while new ones have emerged. The Edutrip, Togethering, and Micro-Segments markets in particular are gaining momentum as travel consumers are still concerned with crafting a trip that meets all of their unique criteria.

This year many new trends revolve around "experiences beyond the guidebook" that invite people to reconsider traditional notions of why, where and how they travel.

## NEW ATTITUDES

### **By Travelers for Travelers**

The new generation of travel content no longer relies on traditional experts. Technology has enabled countless sites and blogs to sprout up that are geared to social networking. Travelers embrace these vehicles and the invitation to organize and shape a travel community, by travelers for travelers.

### **Scarcity Drives Demand**

Travelers are becoming more attracted to the limited and scarce. Destinations that require booking months ahead, knowing someone to get a reservation and those that necessitate accessing insider travel consultant networks are becoming more popular.

### **At Home while Abroad**

To help make some travelers feel more comfortable abroad, many travel companies now employ people of the same visitor nationality to give tours. Speaking the language is no longer sufficient, and many promote "travel with someone from your own country."

### **Going Solo**

Pressed for time and often unable to coordinate vacation schedules with friends, more singles are opting to vacation alone. Tour companies are catering to this growing segment by adding destinations, expanding their matching capabilities and launching programs targeted to distinct traveler profiles like the adventurer or oenophile.

## NEW AUDIENCES

### **Intoxicating Spas**

Not only the choice for pampering and detoxification, spas today focus on pleasure combined with socialization. The latest incarnations are spa/lounge hybrids that cater to mixed sex clientele with plasma televisions, fully stocked bars, late night treatments and popular music.

### **Health-tels**

The tendency to travel for cheaper medical treatment, experimental or elective, is exploding. Many of these medical tourists stay at “health-tels” – hotels offering doctors on staff or a formal association with a hospital or hospitals that have wings designed as hotel suites. While those traveling for minor elective procedures transcend the patient role and explore beyond the health-tel, older clientele take up residence for longer-term care.

### **Semi-Permanent Vacation**

Non-traditional home ownership models are catching on. More and more people are scooping up second and third homes for far more than vacation. Enabled by improved and cheaper communications networks, working remotely is a growing phenomenon. Many employees now bring the office with them while they winter abroad.

### **Commemorating Abroad**

Destination weddings and anniversary trips are no longer the only reasons to travel to the exotic. More families than ever before are gathering away from home for reunions, milestone birthdays and multi-generational bonding experiences. Significant life stage events are now an international celebration and a growing market for hotels, resorts and cruises.

## NEW DESIGN

### **Luxury goes Mainstream**

Luxury offerings are not only defining more travel environments than ever before, they are defining a broader range of travel experiences. The meaning of luxury has changed from exclusive to mainstream, and now is founded in smart design that appeals to all of the senses and encompasses concepts like spacious, clean, modern and tranquil.

### **User-friendly Airports and Airlines**

As safety and cost needs take center stage in airports and on planes, an array of professionals are joining forces to make the boarding, waiting, and riding experiences more comfortable, efficient and economical. Security experts to dance professionals analyze how people occupy space to inform design. Airlines are expanding the popular food and entertainment brands they sell aboard to make flying all the more familiar.

### **Bigger than Ever**

While off-the-beaten-track destinations remain powerful, mega-resorts continue to expand to epic proportions and become self-sustaining resort experiences. The second Atlantis located on The Palm in Dubai will be twice the size of the first resort, and a number of new mega-resorts will soon take root as mixed-use living/vacation centers within cities like Las Vegas.

### **David and Goliath**

Related to the bigger than ever resort trend is the emerging counter-trend of niche resorts that emphasize service, personalization and pampering. The polarization between no need to leave mega-resorts versus small, exclusive boutiques is becoming more pronounced.





# 03. THE CHANNELS

ENSURING COUNTRY BRANDS ARE OPERATING APPROPRIATELY AND STRATEGICALLY ACROSS KEY CHANNELS IS A CRITICAL MARKETING AND BUSINESS CONSIDERATION. ARE ALL CHANNELS EQUAL? SHOULD ALL CONTENT APPEAR IN ALL CHANNELS? WHERE ARE DECISIONS MADE? WHERE ARE OPINIONS CHANGED?

# THE CHANNELS OF TRAVEL DECISIONS

FutureBrand research indicates that the initial way someone becomes interested in traveling to an international destination relies heavily on trusted word of mouth (advocacy of others) and the breadth and depth of the Internet. These two factors alone contribute to almost 50% of the overall initial decision process.

Initial way someone becomes interested in a country:

- 29%** Family & friends
- 19%** The Web
- 13%** TV show or movie
- 10%** Article in a newspaper or magazine
- 9%** Special package offer
- 6%** Travel agent
- 4%** Advertisement
- 10%** Other

Once interested in visiting a country, the top 3 ways information is found are:

- 66%** The Web
- 13%** Travel agent
- 9%** Family & friends

# THE WEB: STILL THE CRITICAL CHANNEL

As was the case last year, the Web remains a dominant and essential channel for promoting countries. Not only popular for selecting and researching a destination, it is increasingly where people go to purchase travel related services.

- Nearly 60% of adult Web surfers have shopped for travel-related services on the Internet in the last 6 months
- 28% of leisure travelers and 31% of combined business and leisure travelers cite the Internet as the place they will go to book their next trip, making it the most used booking channel
- Online travel spending reached \$34.7 billion in the first 6 months of 2006, an almost 15% increase from the same period last year
- Nearly one-third of the 35 million Americans researching travel on the Internet in a 2005 comScore study purchased a travel-related service either online or offline within 2 months following their search. Of these, 80% completed these purchases online







# THE CHANGING WORLD OF THE WEB

In addition to official and unofficial country websites, more and more third party sites are springing up to enable travel research and give the “real” information about a country. Generally, these sites are not affiliated with specific countries, and are designed to help travelers learn about destinations before, during and after their trips. Travel experiences in totality, the good and the bad, are now detailed with the customer in command of the content. As such, this information becomes shared and universal.

Many sites feature social networking tools, thereby allowing travelers to compare experiences, make recommendations and meet up while on vacation. They also offer advice for moving to a new country and suggestions for getting through country bureaucracy.

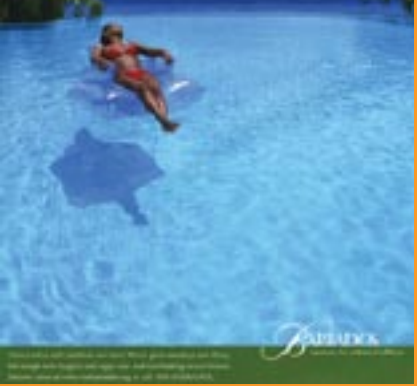
Country brands should consider leveraging some of these tools and related best practices when crafting their promotional sites. If countries do not update their approach and site experiences, they risk being seen as dated and limited.

# COUNTRY **BLAND** PRINT MATERIALS

Within the sea of print collateral, few country brands stand out. In addition to having similar language and tone, many ads and brochures share a similar look and feel. In fear of narrow-casting or focusing on one core asset, many countries go in the reverse direction and link to sweeping and generic words like “truly” or “amazing.” They feature hero shots of sky, beach and other stereotypical images of “paradise” and “culture,” employing a wide palette of bold colors. This attempt to grab consumers and invite them to think about vacationing as the realization of dream, discovery and relaxation has become undifferentiated in a saturated marketplace.

Successful country brand collateral showcases an experience. It transports the reader through copy, design, style and personality. It integrates offerings in a cohesive way but still paints a singular message. A country brand in print is the unfolding of a treasure - an evocative, clear, compelling idea, communicated through images, symbols and story.

Established and large country brands with an array of offerings can employ multiple campaigns that still use the same brand message. Smaller or more specialized country brand efforts should concentrate on building one consistent manifestation of voice and style.



Message or seaweed wrap? No one should be forced to make such a difficult decision while on vacation.

**\$300**

BERMUDA

www.bermuda.com



MEXICO

Consejo de Promoción Turística

MOROCCO

المغرب

The rum that escapes is called the angola share.

The rum that remains would be a sin to spill.

**JAMAICA**

Once you go, you know.

Get rid of 21st century stress. Stand for 5000 years.

**Incredible!ndia**

MAAGANILEY

The Island Challenge

QATAR

قطر

QATAR

Maldives

The Sunny Side of Me



BRITISH

100% PURE NEW ZEALAND

TURKS & CAICOS

BRITISH

BRITISH

Grand Duchy of Luxembourg

# COUNTRY BRAND IDENTITIES

When developing a brand identity to represent a country, the initial challenge is rooted in representing the essence of the brand and its positioning. What the country brand is, distilled from a core idea, should become the focus for the visual representation. Whether the identity is a literal representation or is more abstract is one of many variables that must be carefully considered.

Symbol, colors, arrangement, form and typography are elements that can play a role in defining an ownable and memorable brand identity. This sounds straightforward, but many countries with a variety of destinations or rich cultural or geographic assets can't easily be depicted through one specific icon. Natural characteristics, regional animals or architectural landmarks may not serve as a comprehensive symbolic representation of a nation and all that it offers. Perhaps this is why some countries, as seen in this range of brands, default to their national flag or other abstract elements to create a sense of distinction.

Countries with separate brands for investment or business audiences and governmental seals/brands can add to the confusion and challenge of establishing a single asset to represent a country.

Some countries choose to let advertising campaigns drive the design of their brand, often combining key message or tagline with logo. Though this may create targeted results, it runs the risk of being cluttered and fragmented. Campaigns come and go – brands must last. Consistency and a sense of permanence is critical.

Designing a country brand is unquestionably a major challenge. Not only does the brand need to represent something broad and diverse, it must work technically well within a wide range of brand endorsements or associations, channels and devices. Great brands inspire and endure. They are well considered, expertly crafted and indelible. This page shows a range of brands loosely associated by design themes or devices.

## FLAGS



## SUNS





ELEMENTS







# 04. THE CATEGORY

THE CATEGORY OF COUNTRY BRANDING TODAY IS UNDER PERFORMING AND IS UNDER LEVERAGED. A COUNTRY BRAND IS A UNIFYING AND IDENTIFIABLE PLATFORM THAT IS MANIFESTED IN THE COUNTRY EXPERIENCE. IT IS WHAT'S COMMUNICATED IN ADVANCE OF A TRAVEL JOURNEY AND ABSORBED ONCE IN THE COUNTRY. IT IS SYNERGIZED AND DELIVERED THROUGH DIFFERENT GOVERNMENT AND PRIVATE ORGANIZATIONS AND CREATES INTEREST, INTRIGUE AND INVESTMENT.





# COUNTRY AS BRAND: WHAT AND WHY

While Tourism is often the most consciously marketed aspect of a country, it is only one of many country offerings. It is clear that the image, reputation and brand value of a country impacts the perception of its products, population, investment opportunities and even foreign aid or funding. A country brand at the highest level is much more than a logo or slogan, it is a unifying and identifiable platform that is manifested in the country experience, communicated by officials and citizens and delivered through different government and private agencies. The idea of a country brand is not merely a marketing wrapper, but a value proposition that changes perception and preference, drives usage and increases the economic interests of the country.

Countries are generally fragmented with little cohesion between government agencies, and even less synergy between government and private organizations promoting business or industry within the country.

Without a mechanism for developing a unified brand platform for B2B and B2C channels, countries will falter. They will default to their tourism brand positioning, which in fact may be limited or inappropriate for the larger country initiatives, or use disparate tactics and marketing platforms that are not mutually reinforcing.

Looking at a country holistically, determining its key requirements and objectives, and aligning both senior levels of government with implementers and executors from the beginning are the only ways to help create a true country brand.

# COMPLEX INTERDEPENDENCIES

Few brands are as complicated as countries, with countless audiences, drivers and agencies. There are tremendous challenges associated with navigating these disparate government divisions, private organizations and political agendas. Aligning the parts to create a cohesive whole is a challenge that must be supported at the highest levels of government.



# SEGMENTS

# ENVIRONMENTAL DRIVERS

# AUDIENCES

# MARKET DRIVERS

# COUNTRY BRANDING:



**IN A FAST PACED,  
COMPLEX AND  
COMPETITIVE GLOBAL  
ENVIRONMENT,  
BRAND CAN HELP  
FOCUS STAKEHOLDERS  
ON KEY ISSUES AND  
IDEAS SUCCINCTLY AND  
WITH IMPACT**

# FINDING THE BALANCE



**AN OVERTLY  
BRANDED APPROACH  
THAT TRIVIALIZES  
IMPORTANT ISSUES  
CAN LEAD TO NEGATIVE  
PERCEPTIONS,  
CYNICISM AND  
BACKLASH. CONSENSUS  
DECISIONS CAN ALSO  
RESULT IN LOWEST  
COMMON DENOMINATOR  
SOLUTIONS**





# 2006 **ADDITIONAL** **RANKINGS**

In the pages that follow, we consider the countries that stand out as strong and successful brands across a variety of categories. The rankings speak to both decision-making considerations, as well as country assets that all contribute towards shaping country reputations, perceptions and experiences.

Rankings like “Best Country Brand for Art and Culture” showcase historical assets and leisure traveler tastes, while those like “Best Country Brand for Conferences” reflect business traveler preferences. Still, other rankings such as “Rising Star,” are predictive of future appeal across multiple market segments.

New to this year’s rankings, arrows within the lists tell the story of how country brand performance has changed from 2005 to 2006. In just a year, some countries have risen or fallen dramatically in the rankings, while others have maintained their relative positions. The categories without arrows are new to the Index for 2006.



## Authenticity

Presentation of distinctive, genuine and unique cultures

1.	India	
2.	New Zealand	
3.	Egypt	
4.	South Africa	
5.	Thailand	
6.	Costa Rica	
7.	Lebanon	
8.	Italy	
9.	Peru	
10.	Morocco	



## History

Past accomplishments celebrated through museums and monuments

1.	Egypt	△ (2)	
2.	Italy	▽ (1)	
3.	Turkey	△ (4)	
4.	Greece	▽ (3)	
5.	India	△ (6)	
6.	Israel	△ (10)	
7.	United Kingdom	(7)	
8.	China	▽ (5)	
9.	Japan		
10.	France	▽ (8)	



## Art and Culture

Architecture, fine arts and performing arts abound

1.	Egypt	△ (3)	
2.	Italy	▽ (1)	
3.	India	△ (9)	
4.	Greece	△ (5)	
5.	Japan		
6.	France	▽ (2)	
7.	United Kingdom	▽ (4)	
8.	China	▽ (6)	
9.	Czech Republic		
10.	Turkey		

# BEST COUNTRY BRAND CATEGORIES



## Resort/Lodging Options

Wide variety and superior selection of accommodations

1.	United States	
2.	Bahamas	
3.	Canada	
4.	Italy	
5.	Singapore	
6.	Greece	
7.	Spain	
8.	United Kingdom	
9.	Australia	
10.	United Arab Emirates	

## Families

Welcoming and providing diverse activity options for families

1.	United States	(1)	
2.	New Zealand		
3.	Canada	(3)	
4.	Spain	△ (5)	
5.	Singapore		
6.	Australia	▽ (2)	
7.	United Kingdom	(7)	
8.	Austria		
9.	Italy	▽ (4)	
10.	Sweden		

## Rest/Relaxation

Pleasant weather meets an array of resort and relaxation offerings

1.	Maldives	
2.	Bahamas	
3.	Fiji	
4.	Jamaica	
5.	Greece	
6.	New Zealand	
7.	Thailand	
8.	Spain	
9.	Indonesia	
10.	Australia	

## Beach

Pristine beaches, from remote to mainstream

1.	Bahamas	(1)	
2.	Maldives	(2)	
3.	Fiji	△ (4)	
4.	Brazil		
5.	Greece	△ (8)	
6.	Australia	▽ (3)	
7.	Jamaica	▽ (5)	
8.	Dominican Republic		
9.	Thailand	▽ (7)	
10.	Cuba		



## Natural Beauty

Idyllic geography and topography

1.	New Zealand	
2.	Switzerland	
3.	Greece	
4.	Maldives	
5.	South Africa	
6.	Kenya	
7.	Australia	
8.	Canada	
9.	Fiji	
10.	Peru	

## Off the Beaten Track/Exotic Outdoor Activities/Sports

Less traditional offerings and more unusual excursions

1.	Peru	
2.	Costa Rica	
3.	Kenya	
4.	New Zealand	
5.	Indonesia	
6.	Lebanon	
7.	South Africa	
8.	Thailand	
9.	Iceland	
10.	Fiji	

Pleasant weather and best conditions for popular land or water activities

1.	New Zealand	
2.	Australia	▽ (1)
3.	Kenya	△ (6)
4.	Bahamas	(4)
5.	Switzerland	(5)
6.	United States	▽ (2)
7.	Jamaica	
8.	South Africa	▽ (7)
9.	Canada	▽ (3)
10.	Brazil	

## Safety

Most stable and secure for visitors

1.	Canada	
2.	Switzerland	
3.	New Zealand	
4.	Austria	
5.	Denmark	
6.	Australia	
7.	Singapore	
8.	Sweden	
9.	United Kingdom	
10.	Japan	

# BEST COUNTRY BRAND CATEGORIES



## Business

Ideal to do business in or with

1.	United States	(1)	
2.	Germany	△ (4)	
3.	France	△ (6)	
4.	Canada		
5.	China	▽ (2)	
6.	Australia	△ (9)	
7.	Japan	△ (8)	
8.	India		
9.	United Kingdom	▽ (3)	
10.	Singapore	▽ (7)	



## Easiest to do Business In

Friendly and favorable business culture

1.	United States		
2.	Canada		
3.	Australia		
4.	United Kingdom		
5.	Singapore		
6.	Germany		
7.	China		
8.	Japan		
9.	New Zealand		
10.	Switzerland		



## Extend Business Trip

Where business travelers want to spend their personal holiday time

1.	United States		
2.	Australia		
3.	France		
4.	Italy		
5.	Spain		
6.	China		
7.	Canada		
8.	Japan		
9.	United Kingdom		
10.	Brazil		



## Conferences

Preferred off-site/convention destinations

1.	United States	(1)	
2.	France	△ (8)	
3.	Singapore	△ (9)	
4.	Canada		
5.	China	▽ (3)	
6.	Germany		
7.	Australia	▽ (2)	
8.	Switzerland		
9.	United Arab Emirates		
10.	Brazil		





## Nightlife/Dining

Noteworthy culinary options and first-class bar and club venues

1.	Italy	△(10)	
2.	Singapore		
3.	United States	▽ (1)	
4.	Spain	▽ (2)	
5.	Netherlands		
6.	United Kingdom	▽ (5)	
7.	France	▽ (6)	
8.	Greece		
9.	Thailand	▽ (4)	
10.	Brazil	▽ (3)	



## Shopping

Accessible, abundant and diverse retail options

1.	United States		
2.	Singapore		
3.	Italy		
4.	United Arab Emirates		
5.	Japan		
6.	France		
7.	United Kingdom		
8.	Canada		
9.	Thailand		
10.	India		



## Rising Star

Likely to become major tourist destinations in the next five years

1.	China	(1)	
2.	Croatia	△ (7)	
3.	United Arab Emirates	▽ (2)	
4.	South Africa		
5.	Argentina		
6.	Chile		
7.	Vietnam	△ (10)	
8.	Costa Rica		
9.	Peru		
10.	Turkey		



## Value for Money

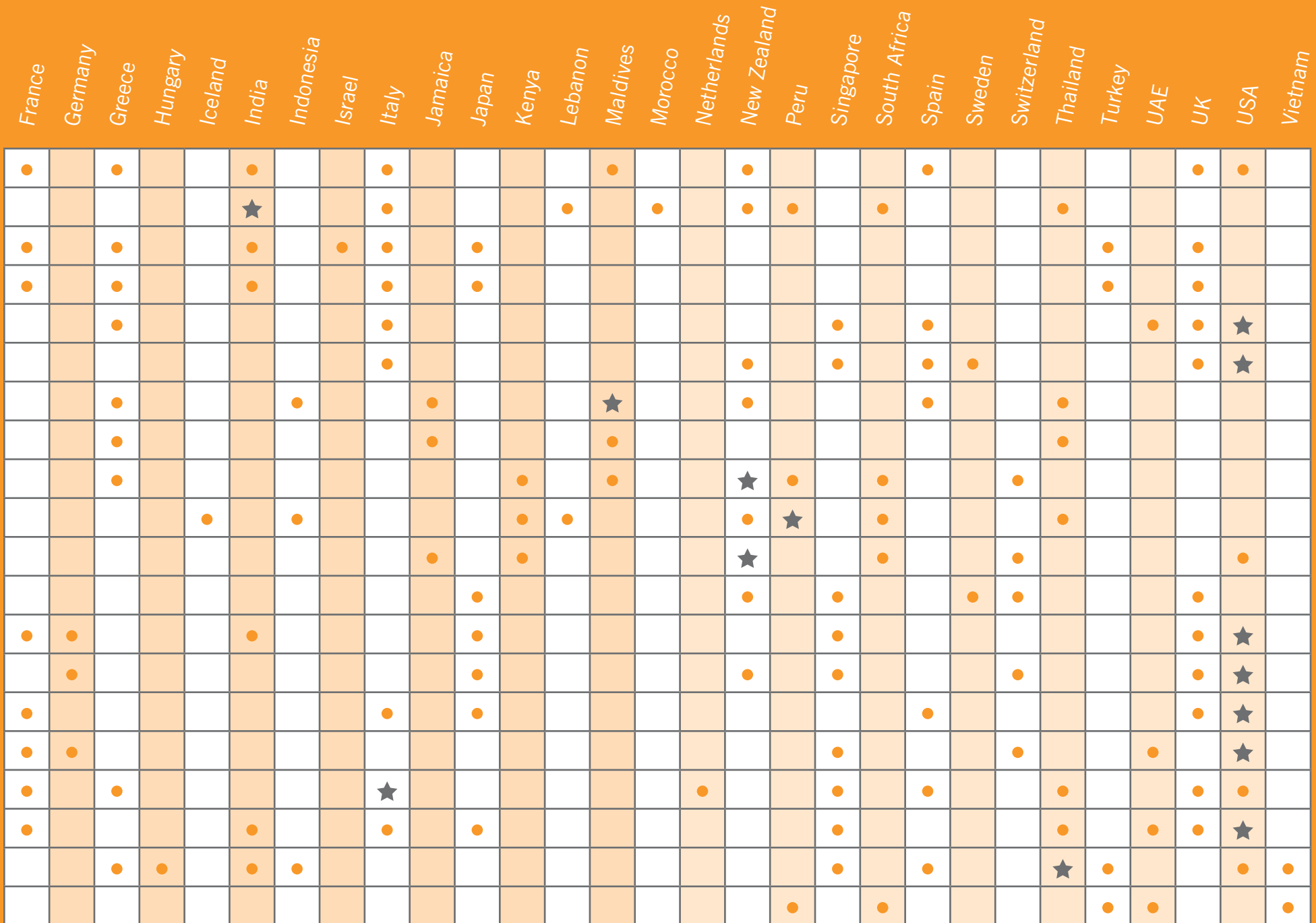
Offering the most in return for the price you pay

1.	Thailand		
2.	Indonesia		
3.	United States		
4.	Turkey		
5.	Spain		
6.	India		
7.	Vietnam		
8.	Singapore		
9.	Greece		
10.	Hungary		

# CATEGORY WINNERS

- ★ = Led in category
- = Ranked in category

	Argentina	Australia	Austria	Bahamas	Brazil	Canada	Chile	China	Costa Rica	Croatia	Cuba	Czech Republic	Denmark	Dominican Republic	Egypt	Fiji
Top Country Brand		★														
Authenticity									●						●	
History								●							★	
Art and Culture								●				●			★	
Resort/Lodging options		●		●		●										
Families		●	●			●										
Rest/Relaxation		●		●												●
Beach		●		★	●						●			●		●
Natural Beauty		●				●										●
Off the Beaten Track/Exotic									●							●
Outdoor Activities/Sports		●		●	●	●										
Safety		●	●			★							●			
Business		●				●		●								
Easiest to do Business In		●				●		●								
Extend Business Trip		●			●	●		●								
Conferences		●			●	●		●								
Nightlife/Dining					●											
Shopping						●										
Value for Money																
Rising Star	●						●	★	●	●						



# METHODOLOGY

Our approach incorporates a global quantitative survey, expert opinions and external statistics. These factors are compared and combined to better understand drivers, preference, importance and relativism of country brands, resulting in a variety of proprietary rankings.

## Global Quantitative Survey

Over 1,500 respondents participated in a travel survey. Respondents were recruited from a globally diverse sample including the Americas, Europe, Asia and the Middle East. Participants were screened to include only frequent international travelers (travel internationally more than once a year) between the ages of 21 and 65, with a balanced split between men and women. Business and leisure travelers were both included. Respondents answered questions about behavior around destination selection, country associations with particular attributes, as well as overall awareness/familiarity, past visits, intent to visit, and willingness to recommend destinations to others. Survey results were aggregated and weighted in proportion to their region's respective volume of travel consumption. This was done in order to minimize potential bias around preferred locations from respondents from regions that may have been over-represented in the sample. Performance on attributes by country was then considered against expert opinions and secondary statistics in order to generate the country rankings.

## Global Expert Opinions

Over 35 international travel industry experts participated in a one-on-one interview or survey regarding their perceptions of countries as brands. Experts were recruited from multiple regions to ensure a diverse and representative sample of opinions.

## Relevant statistics

A variety of relevant statistics and secondary sources are also referenced to inform the Index's results. In addition, data on tourism expenditures per region are used to weight the responses from each region to ensure that regions with disproportionate spend on travel are sufficiently represented. Statistics referenced include:

- Travel services import and export data, and growth rates by country
- The number of key art and cultural sites in each country
- The number of key historical sites in each country
- Beach availability/length of coastline
- Number of top restaurants and nightlife locations
- Climate data: temperature, rainfall, humidity
- Crime per capita
- The World Bank's index of ease of doing business, by country
- Economy size, by country
- Purchase power parity index
- Exchange rates
- Fast food expenditure per capita
- Language fluency by country
- Tourism related marketing expenditure, by country
- Foreign direct investment confidence index

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The Country Brand Index is in conjunction with:



Weber Shandwick is the world's premier global public relations agency and one of the only such agencies with a dedicated Travel & Lifestyle Practice. Firm in its belief that the business and currency of travel is more than a commodity, the agency has earned a reputation for bold, unprecedented programs that not only contribute, but in some cases drive, the marketing process.

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# ABOUT FUTUREBRAND

FutureBrand is a full service global brand consultancy. Shaping with Strategy. Communicating with Design. Implementing for Impact and Reach. We build country brands that aim to increase value, drive business, inspire wanderlust and fire imaginations – all over the world.

## FutureBrand



For more information about purchasing country specific data, branding your country or becoming involved as an expert panelist for FutureBrand's Country Brand Index, please contact:

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